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FOREIGN CROPS and MARKETS

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON, D. C.

Vol. 42

March 31, 1941

No. 13

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L A T E C A B L E S

The Ontario Flue-Cured Tobacco Marketing Association of Canada, in the hope that Canadian tobacco exports to the United Kingdom may be resumed within a year, have decided to permit 100 percent of the 1939 tobacco acreage to be planted in Essex county in 1941. In other areas of Ontario Province, 75 percent of the 1939 acreage (instead of $66\frac{2}{3}$ percent as heretofore expected for the whole Province) will be allowed. No new growers will be admitted, however, and the transfer of acreage quotas will be strictly limited.

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According to official estimates, the 1940-41 production of flue-cured tobacco in Southern Rhodesia will amount to 34,000,000 pounds (farm weight) harvested from 65,439 acres, compared with 33,761,000 pounds from 62,238 acres in 1939-40. The fire-cured crop will be 569,000 pounds, compared with 672,000 pounds in 1939-40.

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G R A I N SCANADA MOVES TO REGULATE
GRAIN SUPPLIES

In contrast to heavy wheat supplies in Canada, feed grains are reported to be short, according to a report from the American Legation at Ottawa. In 1940 the acreage devoted to wheat was increased by about 7 percent, largely at the expense of other grains, and a large crop was obtained. This, plus heavy old-crop stocks in conjunction with restricted European markets, resulted in a record surplus of wheat and no increase in feed-grain supplies, which are now needed for larger livestock production. Of the total cropland, about 80 percent is in western Canada, where wheat is the major grain crop.

CANADA: Utilization of cropland in western and eastern Canada,
1938-1940

Crop	Western Canada			Eastern Canada		
	1938	1939	1940	1938	1939	1940
	Million	Million	Million	Million	Million	Million
	acres	acres	acres	acres	acres	acres
Wheat.....	25.01	25.88	27.83	.92	.87	.89
Oats.....	8.63	8.35	7.94	4.38	4.44	4.35
Barley.....	3.70	3.62	3.64	.75	.73	.70
Rye.....	.66	1.02	.95	.08	.08	.08
Mixed grains.....	.09	.09	.09	1.07	1.13	1.13
Corn: for grain.....	a/	a/	a/	.18	.18	.19
for fodder.....	.03	.10	.10	.38	.39	.40
Buckwheat.....	.01	.01	.01	.37	.33	.32
Flaxseed.....	.20	.30	.35	.01	.01	.04
Grain hay.....	.95	1.00	1.05	-	-	-
Hay and clover.....	1.22	1.27	1.24	7.60	7.56	7.57
Alfalfa.....	.21	.26	.30	.65	.69	.73
Other crops.....	.18	.17	.16	.73	.75	.83
Total.....	40.94	42.07	43.67	17.12	17.16	17.23
Summer fallow.....	15.37	14.73	15.20	-	-	-
Total cropland b/	56.31	56.80	58.87	17.12	17.16	17.23

American Legation, Ottawa.

a/ Not reported but believed to be about 0.05 million acres.

b/ Exclusive of minor crops such as fruits, vegetables, and tobacco.

The wheat supply in Canada at the beginning of the August-July 1940-41 marketing season totaled 852 million bushels. With domestic utilization estimated at 127 million bushels, the surplus available for export was about 725 million as against 502 million bushels at the beginning of the previous season. The carry-over on July 31 is expected to be in the neighborhood of 575 million bushels, which is almost equal to total domestic requirements for 2 years plus a normal carry-over. Although some authorities do not consider this too large a reserve in

view of the European war, a sizable surplus from the 1941 crop added to it would aggravate Canada's already serious wheat-storage and financing problems.

The wheat policy outlined for 1941 (see Foreign Crops and Markets, March 24, 1941) places a limit of 230 million bushels on deliveries to the Wheat Board at fixed prices based on 70 cents per bushel for No. 1 Northern in store at Fort William-Port Arthur or Vancouver. While delivery quotas will be continued in the coming season, they will not be determined according to the acreage seeded for the 1941 crop but on 65 percent of the 1940 acreage. Any additional production above the 230 million bushels that may be marketed during 1941-42 will be the producer's own responsibility and should not exceed 70 million bushels, the estimated requirement of farmers for feed and seed. Producers are therefore urged to reduce their wheat acreage from the 28 million acres seeded for the 1940 crop to about 19 million acres, which, based on past performance, should yield at least 300 million bushels.

In the Prairie Provinces a bonus of \$4 will be paid this season for acreage diverted from wheat to summer fallow, provided the latter is found free of plant growth on July 1, 1941. If a shift from wheat to feed grains is made, \$2 per acre will be paid. Any wheat acreage sown to clover or grass will also bring a bonus of \$2, and an additional \$2 will be paid on July 1, 1942, if it is still seeded to either of these crops. The same additional payment will be made if on the same date rye is found to be growing on land left fallow in 1941. These payments, together with storage fees received for wheat held on farms, are expected to supplement returns from the 230 million bushels that may be marketed at fixed prices and maintain farm income in the Prairie Provinces at not less than \$325,000,000. It is hoped also that an increase in the acreage devoted to feed grains will result, which will avert a shortage of feed and will enable the farmers to produce larger quantities of livestock products for the United Kingdom.

Most of the oats, barley, and rye grown in Canada are retained on farms, especially in eastern Canada. Even from the Prairie Provinces, shipments of feed grains through the ordinary grain-marketing channels are small. A large part of the apparent domestic consumption is used for seed and for food products. Nearly 4 percent of the barley is used by brewers, and much of the corn is manufactured into starch and breakfast foods. Although wheat is not considered a feed grain, considerable quantities have been used for feeding purposes in recent years. Most of that grown in eastern Canada is so used. In 1939-40, about 1.1 million tons of wheat were fed as compared with 5.9 million of oats, 1.8 million of barley, 1 million of mixed grain, and 0.2 million tons of corn.

Corn is the only grain that is imported by Canada in significant quantities. During 1936 and 1937, such imports were fairly high because crops of other feeds were reduced. In later years, they have averaged

around 8 million bushels, about half of which was used for manufacturing purposes and originated largely in the United States. South Africa and Argentina usually supply Canada's requirements of imported corn for feed.

CANADA: Corn imports, classified according to use and country of origin, 1936-1939

Use and origin	1936	1937	1938	1939
	Million bushels	Million bushels	Million bushels	Million bushels
<u>For Distillation -</u>				
United States	0.03	0.11	1.12	0.56
Africa	-	a/	-	.25
Argentina .....	.49	.54	.17	-
Total .....	.52	.65	1.29	.81
<u>For Starch or Cereals -</u>				
United States .....	.43	.15	5.13	1.48
Africa .....	.58	1.32	-	.95
Argentina	1.95	.80	a/	a/
United Kingdom .....	.22	.03	-	-
Total	3.18	2.30	5.13	2.43
<u>For Feeding -</u>				
United States .....	.03	.05	.96	1.13
Africa	1.95	11.75	1.57	3.48
Argentina	11.60	1.79	.12	.02
Australia	-	-	.28	-
Total	13.58	13.59	2.93	4.63
<u>All uses -</u>				
United States .....	.49	.31	7.21	3.17
Africa	2.53	13.07	1.57	4.68
Argentina	14.04	3.13	.29	.02
Others .....	.22	.03	.28	-
Total	17.28	16.54	9.35	7.87

American Legation, Ottawa.

a/ Less than 5,000 bushels.

Although the 1940 crops of feed grains were about normal, a scarcity of feed has developed, partly because of a 10-percent increase in grain requirements for livestock and partly because the quality of the grain grown in eastern Canada was reduced by reason of adverse harvesting weather. Although some quantities were carried over from the previous year, they added about 10 percent only to the total stocks on hand. By the end of February, the visible supply in millions of bushels was as follows, with last year's comparisons in parentheses: oats 6.7 (12.7), barley 5.4 (9.4), and rye 6.0 (3.8). Most of the oats and barley were in the western Provinces, and the greater part of the rye was stored in the United States.

In order to relieve the shortage in the eastern Provinces, the Dominion Government offered to share equally with the Maritime Provinces in the cost of shipping feed grains from Montreal. Later the offer was extended to the five eastern Provinces with respect to freight charges from Fort William on 8 million bushels if shipment was made before July 15, 1941. On March 4, the Minister of Agriculture was empowered to restrict the exportation of feed grains and mill feeds at his discretion. Up to March 15, Ontario was the only Province to take advantage of the free freight policy, and so far as known, no restrictions have been placed on the exportation of feeds.

Canada: Distribution of feed-grain crops,
August-July 1938-1940

Item	Oats a/			Barley		
	1938-39	1939-40	1940-41	1938-39	1939-40	1940-41
	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels	Million bushels
Stocks at beginning of year	22.8	49.2	46.8	6.4	12.8	11.5
Production	371.4	384.4	380.5	102.3	103.1	104.3
Imports	3.3	0	-	0	0	-
Total supply	397.5	433.6	427.3	108.7	115.9	115.8
Exports	14.2	15.8	-	16.5	12.1	-
Stocks at end of year..	49.2	46.8	-	12.8	11.5	-
Apparent consumption -						
For seed	25.0	25.0	-	12.0	12.0	-
For feed, etc.	309.1	346.0	-	67.4	80.3	-
	Rye			Corn		
Stocks at beginning of year	1.0	2.0	2.0	b/	b/	b/
Production	11.0	15.3	14.0	7.9	8.7	8.6
Imports	0	0	-	8.5	6.0	-
Total supply	12.0	17.3	16.0	16.4	14.7	8.6
Exports	1.8	4.6	-	0	0	-
Stocks at end of year..	2.0	2.0	-	b/	b/	-
Apparent consumption -						
For seed	2.0	2.0	-	0	0	-
For feed, etc.	6.2	8.7	-	16.4	14.7	-

American Legation, Ottawa.

a/ Canadian oats are reported in bushels of 34 pounds rather than of 32 pounds as in the United States.

b/ Not reported.

NETHERLANDS INDIES EXPANDS RICE PRODUCTION . . .

The rice crop of the Netherlands Indies for 1940 was the largest in the history of the country, according to a report from American Vice Consul Paul Paddock at Batavia. The rapid expansion in production during recent years is expected to continue in 1941, and, if crop conditions are favorable, it is believed that the Netherlands Indies may this year change from a traditional deficit rice country to a surplus producer. This attainment has been the result of the Government's effort, which began in 1933, to make the country self-sufficient in regard to food supplies.

Production for all the Netherlands Indies for 1940 was placed at 626 million bushels as compared with 607 million in 1939 and 598 million in 1938. Production for Java and Madoera, usually reported for the Netherlands Indies since figures for other areas have not been available, has increased very sharply during the past decade. The harvest of 430 million bushels for 1940 compares with the 50year average crop of 1930 to 1934 of 270 million bushels.

NETHERLANDS INDIES: Rice production,
1938, 1939, and 1940

Region	1938	1939	1940
	1,000 bushels	1,000 bushels	1,000 bushels
Java and madoera	300,642	400,856	430,171
Sumatra	a/	a/	120,025
Borneo	a/	a/	14,697
Celebes	a/	a/	26,945
Bali and Lombok	a/	a/	19,596
Others	297,038	206,619	14,697
Total	597,680	607,475	626,131

American Consulate, Batavia. a/ Included in "Others."

Several factors have contributed to this sensational increase in production, the most important of which has been the Government's encouragement and assistance. As the chief food of the natives, it is recognized that the welfare of the country depends to a most important degree on an adequate rice crop. Government officials have spent considerable effort in aiding the natives to increase their rice acreage and yield per acre.

The improvement of transportation facilities is an important factor in the expansion of rice land. Formerly little was grown away from the railroad lines except for local consumption because of the

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difficulties of transporting the rice to market. Now, with highways being extended to all parts of the archipelago, it is practical to develop many new rice fields.

Irrigated fields account for more than 90 percent of the rice production. Normally they are not dependent on seasonal weather and are continuously under cultivation. The extension of irrigation works has been an important factor in the increased production during recent years. The Government has been active in developing irrigation projects in several parts of the country. None of the Government projects are repaid by the users, as is such a common practice in many countries. The largest irrigation project in the Netherlands Indies, the Sadang Irrigation Works in Mid-Celebes, was finished in 1940 and will irrigate an area of approximately 140,000 acres.

Higher yields per acre are being obtained as the result of Government encouragement of improved methods of planting and cultivation, greater care of the harvested crop, the introduction of higher-yielding varieties, and communal combatting of pests and diseases. The Government has also encouraged the cultivation of the second crop on nonirrigated land, planted in April and May and harvested in August and September, which has also increased the yield.

The policy of colonizing natives from over-populated Java in the outer islands (the area of the Netherlands Indies outside of Java and Madoera), which was started by the Government in 1933 when a definite program for this colonization was drawn up, has favorably affected the production of rice. These colonies are designed to be self-supporting and, therefore, the first development is the conversion of waste area into rice fields. After sufficient food has been produced the natives are then encouraged to produce other crops. The total amount of waste land brought into rice cultivation by the various colonies was estimated at 100,000 acres in 1940.

Production for the Netherlands Indies in 1940, despite the record crop, was affected unfavorably by drought in the nonirrigated areas throughout the archipelago. It is estimated that the drought reduced the harvesting by more than 7 million bushels. A favorable result of the drought, however, is expected in increased yields in 1941 because the dried cracked soil was well aerated, killing much of the fungus growth in old rice fields.

A few years ago the Netherlands Indies was rated as one of the leading rice-importing countries of the world. During the period 1926 to 1930 China and British Malaya were the only countries importing larger quantities. Since the Government initiated the policy in 1933 of becoming self-sufficient in food supplies, imports have steadily declined and exports have increased. If weather conditions are favorable in 1941 for producing another large crop, it is believed that the Netherlands Indies

may this year become a net exporter of rice. The principal sources of imported rice have been Burma and Thailand. The marked increase in exports of Java rice in 1940 was significant, the two principal markets being Singapore and Japan.

NETHERLANDS INDIES: Rice imports, exports, and net imports,
1933 to 1940

Year	Imports	Exports	Excess of imports over exports
	1,000 pounds	1,000 pounds	1,000 pounds
1933	787,545	31,103	756,442
1934	616,047	28,898	587,149
1935	855,660	32,352	823,308
1936	513,498	51,733	461,765
1937	391,698	67,741	323,957
1938	736,788	37,127	699,661
1939	613,282	47,897	565,385
1940 (January-November) .	238,784	110,655	128,129

American Consulate, Batavia.

Rice prices in the Netherlands Indies are controlled by the Government. The production and marketing are very closely watched and regulated, so that, to a large extent, prices received by the grower, the miller, and the distributor are those which the Government determines. The months of December, January, and February are the periods when rice stocks are the lowest, and, in order to protect the natives and to insure that sufficient quantities of rice will be available for consumption, a unique system has been developed. In March, when the new crop begins to be harvested, the Government establishes a certain price for milled rice, which it considers to be fair and which is assumed to be what the rice would bring in the open and free market. For a certain type of rice a price of \$1.86 per 100 pounds free on rail to the north coast of Java may be established as of March 1. Thereafter, an increase of about 2.5 cents per month for 8 months is allowed by the Government until the final price \$2.05 is reached. At the end of 8 months it is necessary for all holders of rice to dispose of their stocks, because it is not practical to carry over old rice.

While many Government programs have been severely criticized by the natives, the Netherlands Indies rice policy has been well received. In 1940, despite all the unsettled conditions arising from the European war, the loss of income from many sources, and the many regulations issued by the Government regarding business in general, the rice industry has remained stabilized and profitable, and prospects for 1941 appear even more favorable.

BURMA HARVESTS LARGE RICE CROP . . .

The 1940-41 rice crop in Burma was officially estimated at 401,625,000 bushels, possibly the largest harvest on record, according to a report received from American Vice Consul Martin J. Hillenbrand at Rangoon. Production last year of 348 million bushels was below average, partly because of heavy floods that destroyed a larger percentage than usual of the sown acreage, and also because of considerable insect injury. Weather conditions during the current season were reported favorable, and there was almost complete absence of flooding, which usually accounts for the loss of a certain amount of acreage. The sown acreage this year was estimated at 12,797,000 acres as compared with 12,891,000 acres for the 1939-40 season. The area harvested this season, however, exceeded that of last year, amounting to 12,413,000 acres as compared with 12,010,000 acres.

BURMA: Rice acreage, production, and yield,
1935-36 to date

Year	Acreage	Production	Yield per acre
	<u>1,000 acres</u>	<u>1,000 bushels</u>	<u>Bushels</u>
1935-36	12,202	373,556	30.6
1936-37	12,108	352,852	29.1
1937-38	12,534	342,837	27.4
1938-39	12,533	400,199	31.9
1939-40	12,010	348,157	29.0
1940-41	12,413	401,625	32.4

Compiled from official sources.

Burma is considered the world's largest rice-surplus country, usually exporting about 60 percent of the entire crop. The surplus from the total 1940-41 harvest, available for export during 1941, has been estimated at 8,019 million pounds. Probable exports for the year were placed at 7,600 million pounds. During 1940 total exports of milled rice and paddy in terms of milled rice amounted to 6,500 million pounds.

India in 1941 is again expected to be the principal market for Burman rice although, if the current high prices are maintained, the percentage shipped will undoubtedly be smaller this year. During the early months of 1941 Ceylon and Malaya have been active buyers. The demand from Hong Kong and Shanghai has continued strong, but the lack of cargo space has held up delivery. Japanese buyers have recently entered the market but it is not expected that they will purchase quantities as large as last year. The short crop in Thailand has also been a factor in causing the present higher prices.

BURMA: Exports of milled rice, 1939 and 1940

Country of destination	1939	1940
	1,000 pounds	1,000 pounds
India	4,584,178	3,031,237
Japan	17,389	1,010,155
Ceylon	816,155	778,821
Straits Settlements	306,047	310,121
United Kingdom	133,925	150,443
Federated Malay States	151,713	166,974
China	15,781	116,498
Hong Kong	15,579	61,681
British West India Islands	79,094	75,033
Mauritius and Dependencies	50,172	72,764
Cuba	3,416	8,826
Canada	27,653	9,041
Germany	288,335	-
Sumatra	163,580	-
Other countries	685,290	143,400
Total	7,343,307	5,934,994

American Consulate, Rangoon.

GRAIN STATISTICS . . .

WHEAT, INCLUDING FLOUR: Shipments from principal exporting countries, as given by current trade sources, 1938-39 to 1940-41

Country	Total shipments	Shipments 1941 week ended	Shipments July 1-Mar.22
	1938-39 : 1,000 bushels	1939-40 : 1,000 bushels	1939-40 : 1,000 bushels
North America. <u>a</u> /	245,296	209,872	4,787
Argentina.....	114,272	173,776	5,697
Australia	102,116	<u>b</u> /	:
Soviet Union	39,824	-	:
Danube & Bulgaria <u>c</u> /	52,848	39,616	:
British India <u>a</u> /	<u>d</u> /10,097	-	:
Total above	564,453	:	<u>e</u> /
Total European <u>a</u> /	450,734	:	:
Total ex-European <u>a</u> /	146,760	:	:

Compiled from official and trade sources.

a/ Broomhall's Corn Trade News. b/ Not available. c/ Black Sea shipments only; no figures for current weeks. d/ Official. e/ North America and Argentina only.

GRAINS: Weekly average closing price per bushel, future delivery,
at leading markets, 1940-1941

Week ended	Wheat						Corn					
	Chicago			Winnipeg			Buenos Aires			Chicago		
	1940	1941	1940	1941	1940	1941	1940	1941	1940	1941	1940	1941
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High <u>b/</u>	105	88	81	72	<u>c/</u> 69	<u>d/</u> 56	59	64	<u>e/</u> 53	28		
Low <u>b/</u>	97	80	77	70	<u>c/</u> 58	<u>d/</u> 55	56	61	<u>e/</u> 36	28		
					May							
Feb. 22	105	80	81	70	60	55	57	61	36	28		
Mar. 1	102	83	81	71	61	55	57	61	37	28		
8	103	83	81	70	62	55	57	61	36	28		
15	102	86	80	72	62	55	56	63	36	28		
22	104	88	81	71	62	55	56	64	36	28		

Corn prices at Buenos Aires compiled from New York Journal of Commerce; all other prices from Chicago Daily Trade Bulletin. a/ Official price. b/ Jan. 4, 1941, to March 22, 1941 and corresponding dates for 1940. c/ March and May futures. d/ April and May futures. e/ Feb.-May futures.

FEED GRAINS: Movement from principal exporting countries,
March 22, 1941

Commodity and country	Yearly exports: Shipments week ended <u>a/</u>						Exports so far reported	
	1938-39	1939-40	Mar. 8	Mar. 15	Mar. 22	July 1	1939-40	1940-41
						to	b/	b/
	1,000	1,000	1,000	1,000	1,000		1,000	1,000
BARLEY, EXPORTS: <u>c/</u>	bushels	bushels	bushels	bushels	bushels		bushels	bushels
United States	11,215	3,532				Jan. 31	3,029	426
Canada	16,537	13,338				Dec. 31	12,078	746
Argentina	9,356	18,628				Feb. 15	8,179	3,262
Danube & U.S.S.R. .	26,005	4,297	0	0	0	Mar. 22	3,921	1,000
Total	63,113	39,795					27,207	5,434
WHEAT, EXPORTS: <u>c/</u>	bushels	bushels	bushels	bushels	bushels		bushels	bushels
United States	5,106	1,429				Jan. 31	770	511
Canada	13,738	24,330				Dec. 31	10,842	8,366
Argentina	19,379	27,624	193	48	138	Mar. 22	22,254	3,283
Danube & U.S.S.R. .	30	250	0	0	0	Mar. 22	70	0
Total	38,253	53,633					33,936	12,160
CORN, EXPORTS: <u>d/</u>						Oct. 1 to		
United States	34,369	44,284				Jan. 31	17,445	7,351
Danube & U.S.S.R. .	19,629	5,304	0	0	0	Mar. 22	2,545	0
Argentina	142,869	87,766	666	228	973	Mar. 22	42,969	19,396
South Africa	25,991	15,499	0	0	0	Mar. 22	8,594	0
Total	222,858	152,853					71,553	26,747
CORN, IMPORTS:								
United States	442	1,110				Jan. 31	183	774

Compiled from official and trade sources. a/ The weeks shown in these columns are nearest to the date shown. b/ Preliminary. c/ Year beginning July 1. d/ Year beginning October 1.

VEGETABLE OILS AND OILSEEDSCHINESE VEGETABLE-OILSEED SUPPLY
LARGER IN 1940-41

The Chinese vegetable oil and oilseed outlook for 1940-41 appears better than for the previous year. The 1940 production was larger, due to expansion and more favorable weather conditions than in 1939. Both the Japanese and Chinese will try to increase exports for the purpose of securing foreign exchange. Although total exports of all vegetable oilseeds during the calendar year 1940 showed a noticeable reduction from those of 1939, the foreign exchange secured amounted to about the same, as the price of these products increased more rapidly than the Chinese dollar depreciated. Prices advanced despite the larger production, probably due to the poor rice crop in 1940, which caused a further rise in commodity prices. The prospective high prices for the 1940 crops may encourage larger plantings in 1941.

CHINA: Vegetable-oilseed and -oil exports,
1937-38, 1938-39, and 1939-40

Item	Marketing year	Unit	Exports		
			1937-38	1938-39	1939-40
			Thousands	Thousands	Thousands
Tung oil	Nov. -Oct.	Pound	179,857	72,000	58,000
Peanuts -	Nov. -Oct.				
Kernels		Pound	71,650	108,316	90,478
Unshelled		Pound	43,138	68,245	10,982
Oil		Pound	43,784	66,788	56,621
Cake and meal		Pound	7,543	29,629	21,016
Cottonseed	Oct. -Sept.	Pound	105,600	2,267	0
Cottonseed oil		Pound	2,000	2,667	2,054
Flaxseed	Sept.-Aug.	Bushel	272	177	54
Soybeans	Oct. -Sept.	Bushel	92	178	400
Sesame seed	Oct. -Sept.	Pound	28,555	14,011	32,007
Tea oil	Jan. -Dec.	Pound	a/ 28,448	b/ 13,577	c/ 5,506
Rapeseed	May -Apr.	Pound	11,733	1,067	65

American Consulate, Shanghai. a/ 1937. b/ 1938. c/ 1939.

Peanuts

The 1940 peanut production in free China is estimated at 2.7 million pounds or about 9 percent above that of 1939. The crop from this area is almost entirely for domestic consumption. The 1940 production figures for occupied China are not available; however, the crop is reported to be larger than the previous year and of fairly good quality. Total exports of peanuts and peanut oil from China during the 1939-40 marketing season (November-October) were smaller than in the year before and considerably below the 5-year average 1934-35 to 1938-39. The outlook for 1940-41 is not bright, as trade with Canada, which represented

the major portion of exports during 1939-40, is now under an import license system and will undoubtedly favor imports from India. There may be some increase over last season in shipments to Germany via Siberia.

CHINA: Exports of peanuts and peanut oil by countries of destination, average 1933-34 to 1937-38 and annual 1937-38 to 1939-40

Year (November-October)	United States 1,000 pounds	Europe 1,000 pounds	Hong Kong 1,000 pounds	Japan 1,000 pounds	Others 1,000 pounds	Total 1,000 pounds
<u>Unshelled</u>						
Average -						
1933-34 to 1937-38...	261	50,931	1,571	3,808	10,139	66,710
1937-38.....	-	31,963	1,469	234	9,472	43,138
1938-39.....	-	44,131	639	3,263	20,212	68,245
1939-40.....	-	1,403	536	523	8,520	10,982
<u>Shelled</u>						
Average -						
1933-34 to 1937-38...	1,337	105,342	14,761	9,729	25,490	156,709
1937-38.....	33	40,970	12,817	3,785	14,045	71,650
1938-39.....	93	42,901	6,191	14,087	45,044	108,316
1939-40.....	761	11,395	7,946	3,747	72,629	96,478
<u>Oil</u>						
				<u>Canada</u>		
Average -						
1933-34 to 1937-38...	26,754	13,672	15,167	6,232	5,331	67,156
1937-38.....	3,717	12,637	25,141	1,149	1,140	43,784
1938-39.....	11,023	33,383	6,529	5,271	10,577	66,788
1939-40.....	35,219	760	4,376	5,169	10,798	56,622

American Consulate, Shanghai.

a/ A large percentage of this was destined for Canada.

Cottonseed

Chinese cottonseed production for 1940 is estimated to be about 25 percent larger than the abnormally low yield of 1939. Oil production from the 1940 crop is expected to show little improvement, as commercial oil mills have not increased their rate of operation. According to the Chinese maritime customs, no seeds were exported during the 1939-40 marketing year, and oil shipments were below the previous season. The only shipments of cottonseed oil recorded for 1939-40 were to the United States and the Kwantung Leased Territory. Normally Japan obtains most of the cottonseed exported from China.

Flaxseed

Total production of flaxseed has not been reported for 1940, but the crop in Inner Mongolia was believed to be larger than in 1939, as weather conditions were more favorable. Distribution has been under control of the Japanese-sponsored regime of Inner Mongolia since October 20, 1939, partially accounting for the shift in destination of exports.

CHINA: Exports of flaxseed by destinations,
1935-36 to 1939-40

Year (September-August)	United States	Australia	Japan	Others	Total
	<u>1,000 bushels</u>	<u>1,000 bushels</u>	<u>1,000 bushels</u>	<u>1,000 bushels</u>	<u>1,000 bushels</u>
1935-36.....	437	810	317	a/	1,564
1936-37.....	185	217	242	a/	644
1937-38.....	-	-	273	0	273
1938-39.....	41	81	55	a/	177
1939-40.....	12	4	37	1	54

American Consulate, Shanghai. a/ Negligible.

Soybeans

Total 1940 soybean production in China was about 11 percent above the previous year. The increase was attributed to a larger acreage due to the stronger domestic demand for oil and to better weather. While China's soybean production is very large, the export and import trade in recent years has been relatively unimportant. Exports of soybeans increased during 1939-40, while imports showed a decline from the high level of the year before. It is possible that extensive shipments of Manchurian soybean oil were made to Shanghai during 1939-40 under the Japanese military consignment and not recorded as imports.

CHINA: Soybean production and trade, average 1934-1938,
annual 1937-1940

Year	Production	Imports a/	Exports a/
	<u>1,000 bushels</u>	<u>1,000 bushels</u>	<u>1,000 bushels</u>
Average 1934-1938.....	205,667	1,144	124
1937.....	213,189	2,177	92
1938.....	207,600	4,827	178
1939.....	203,900	1,826	400
1940.....	216,800	-	-

American Consulate, Shanghai.

a/ Trade figures are for season beginning October 1, year of harvest.

Sesame

In the territory under the complete control of the Chinese Government, the area planted to sesame in 1940 showed an increase of 5 percent and production an increase of 4 percent. Estimates for the Japanese-occupied area are not available, but indications point to increased production. Before the outbreak of the Sino-Japanese hostilities in 1937, the total exports ran around 220 million pounds. The principal destinations were the United States, Europe, and Japan. Since

then, total exports have suffered drastic decreases due to restricted marketing facilities. During the 1939-40 season, exports showed a pronounced recovery, and further increase is anticipated for 1940-41.

CHINA: Exports of sesame seed by destinations,
1934-35 to 1939-40

Year (October-September)	United States	Europe	Japan	Hong Kong	Others	Total
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
1934-35.....	145,966	58,992	23,616	4,367	12,477	245,418
1935-36.....	123,191	27,988	48,491	3,410	22,773	255,853
1936-37.....	14,069	144,711	44,681	3,161	18,687	225,309
1937-38.....	561	11,580	9,430	3,034	3,950	28,555
1938-39.....	1,126	-	9,077	1,779	2,029	14,011
1939-40.....	10,684	3,628	7,700	2,730	7,265	32,007

American Consulate, Shanghai.

Teaseed oil

No reliable estimate is available regarding teaseed-oil production for 1940, but it is believed that it will be small, as difficulties in shipping have reduced farmers' profits on this crop. The United States is the most important market for this oil. While customs returns show heavy shipments to Hong Kong, they are usually reexported to this country and direct shipments account for 35 to 50 percent of the total.

Tung oil

The 1940 crop of tung nuts is reported to be larger than the 1939 harvest, primarily due to increased plantings coming into bearing. The Chinese Government continued its efforts to promote this product for the purpose of exporting it to foreign countries, especially the United States, in order to secure foreign exchange. Total exports of tung oil from China during the 1939-40 season suffered a further decrease of about 20 percent from the low figure reached the year before. This decrease is attributed to the closing of international routes leading from the southwest of China to French Indochina and Burma during part of the season and to the intensified Japanese blockade of the Chinese coast. Prospects for 1940-41 are not expected to show much improvement, as military operations are likely to be continued around Hankow in a way sufficient to retard the movement of farm products to marketing centers, and the Japanese are not permitting shipments to be made down the Yangtze River.

C O T T O N - O T H E R F I B E R SRECORD COTTON CROPEXPECTED IN SOUTHERN BRAZIL . . .

The 1941 cotton crop now being picked in the State of Sao Paulo, Brazil, is expected to reach 1,660,000 to 1,750,000 bales compared with the previous record crop of 1,418,000 bales produced in 1940, according to information received in the Office of Foreign Agricultural Relations. The 1941 acreage was unofficially estimated at 15 percent above last year's figure. Seed distribution was only 4 percent higher, but weather conditions have been exceptionally favorable since planting time. Last year, growing conditions were less favorable than usual.

The State of Sao Paulo in Southern Brazil has accounted for a major part of Brazil's rapid development in recent years, both of cotton production and manufacturing. In 1933, Sao Paulo produced 98,000 bales or 17.6 percent of the total of 555,000 bales for all Brazil. The 1940 crop of 1,418,000 bales represents 60 to 65 percent of the total for Brazil. (The final official estimate is expected early in April.) Sao Paulo mills consumed about 219,300 bales of raw cotton in 1939 representing about 41 percent of the estimated total of 536,900 bales consumed by all Brazilian mills in that year. Brazilian mills now supply practically all domestic textile requirements except certain novelty items and high-quality materials. In addition, small quantities are now being exported to other Latin American nations, particularly, Argentina. A Brazilian press report of January 30, 1941, stated that an arrangement had been made whereby Brazilian textile mills would export about 20,450,000 yards of cotton sacking to Argentina during the first 6 months of 1941.

The size of the new cotton crop and the slow movement, resulting from disruption of foreign markets and scarcity of transportation facilities, created a financial problem for commercial banks, cotton ginner, and exporters. Consequently the Federal Government announced on February 15, 1941, that loans equivalent to 6.6 cents per pound for type 5 cotton would be granted through the Bank of Brazil on warehouse receipts for cotton stored in approved warehouses. (See Foreign Crops and Markets, February 24, 1941.) The loan rate is 80 percent of a minimum price of 45 milreis per arroba (8.24 cents per pound) for Sao Paulo type 5 cotton, with current quotations as a basis when they exceed the minimum price. Quotations for type 5 cotton on the Sao Paulo Merchandise Exchange averaged 42.5 milreis per arroba (7.79 cents per pound) for the week ended March 20. During the first half of January, prices maintained a level of about 45 milreis per arroba (8.24 cents per pound) but declined sharply to 40.5 milreis (7.42 cents) by the end of the month. The trend has been slightly upward since the Government loan was announced. Prospects of a bumper crop with reduced export outlets and shortage of cargo space to available foreign markets were the most depressive influences. It appears also that carry-over on March 1 was larger than

previously expected. Warehouse stocks at Sao Paulo on January 31 were reported at 143,500 bales. The new crop will begin to move in volume during April.

The transportation problem is expected to become worse after March, as one of the principal American steamship lines now carrying Brazilian cotton to New England ports for transshipment to Canada plans to discontinue the service in preference for other cargo. Japan has been the leading market for Brazilian cotton in recent months, accounting for 216,000 out of the total of 620,000 bales exported during the 7 months ended with February 1941. (January and February figures are for Santos only.) Shipments to Canada totaled 106,000 bales in addition to part of the 31,000 bales reported as exports to the United States but transshipped to Canada. Exports to Sweden, which have been insignificant in the past, totaled 23,000 bales in January.

LIVERPOOL COTTON MARKET EXPECTED TO CLOSE MARCH 31 . . .

The cotton futures market at Liverpool continued on narrow lines, and outside interests remained restricted to closing out of open commitments. It is now definitely believed in trade quarters that the Government will close the market at noon March 31. The spot market at Liverpool continued at an almost complete standstill in view of the Government's decision to take over all merchants' stocks on April 1, when it will assume control of all trade in raw cotton. The week's sales were further reduced and totaled only about 3,000 bales. In connection with the taking over by the Government of all raw-cotton imports as from April 1, the Liverpool Cotton Association has agreed to accept the Government's proposal for the formation of a company composed of members of the Liverpool and Manchester Associations. This company is to act as agent for acquiring cotton on Government account in any part of the world, and to arrange distribution to spinners in the United Kingdom.

Manchester trade in yarn and cloth remained limited, with producers disinclined to accept fresh business until their position is clarified under the new industrial policy. It is reported that under the Government scheme to concentrate production in the most efficient plants, about 200 spinning mills and 300 weaving sheds are expected to be shut down.

SOUTH AFRICAN COTTON PRODUCTION INCREASED FOR WAR INDUSTRIES . . .

Cotton growing in the Union of South Africa is being revived by increased demand for war industries and consequent higher prices,

according to information received in the Office of Foreign Agricultural Relations. Low prices were largely responsible for a decline in production from 2,800 bales in 1936-37 to 600 bales in 1938-39. In response to increased wartime demand in local munitions, textile, and shoe industries, however, production was again increased to 1,700 bales in 1939-40, and a much larger acreage was planted for the 1940-41 crop.

The principal cotton-growing areas are in eastern Transvaal, Natal, Zululand, and the northwestern part of Cape Province along the Orange River. The highest grade cotton is grown in the latter area on silt soil, and most of it is under irrigation. The planting season in the Union extends from October to January, varying with the region, and picking lasts from April-May to November. More than 90 percent of the cotton usually has a staple length of 1-1/8 inches or longer (South African standards), and in recent years 60 to 75 percent of it has been classed as middling or better. No accurate estimate of the 1940-41 crop can be made at present, but weather conditions up to January 21 had been very favorable, with plenty of rainfall.

Exports of raw cotton from the 1939-40 crop amounted to about 440 bales (of 478 pounds) mostly low-grade cotton. The entire amount was shipped to the United Kingdom. Most of the remaining 1,200 bales were consumed by the local munitions industry although small quantities were sold to the local textile and shoe industries. Export statistics indicate that prior to the outbreak of war in Europe about 350 to 400 bales of domestic cotton were consumed locally and imports consisted largely of linters and waste. A tax of 1 shilling (30 cents) is levied on each 100 pounds of cotton lint or 300 pounds of seed cotton exported, and the proceeds are applied toward the upkeep of experimental farms. All South African cotton is Government graded and guaranteed as to grade and staple.

As a crop protection against insect pests, particularly the pink bollworm, imported cotton and linters are subjected to strict regulations concerning fumigation and storage in certified warehouses. An agreement is being worked out whereby Belgian Congo cotton destined for export markets may pass through the Union of South Africa in sealed cars and accompanied by a certificate to the effect that neither pink bollworm nor foot-and-mouth disease are prevalent in the country.

About two-thirds of the textile import requirements of the Union of South Africa are usually supplied by the United Kingdom, while considerable quantities are obtained from Japan. Belgium and Italy also were important sources of imports in former years. The domestic textile industry is concerned mainly with the spinning and weaving of blankets and rugs, for the native trade, and minor household items, including upholstery.

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T O B A C C OSPAIN'S TOBACCO SUPPLIES SHORT
IN POST-WAR YEARS

The immediate outlook for the Spanish Tobacco Monopoly is by no means optimistic, due entirely to its inability to purchase supplies from foreign sources in sufficient quantities to meet the demands of the market, according to a report received in the Office of Foreign Agricultural Relations. Through close cooperation with interests in the Philippine and Canary Islands, the Monopoly has been able to acquire important supplies from those areas, but imports from the United States and other sources have been limited.

No statistics for 1940 are available, but the actual supplies of tobacco products have become so limited in Spain that severe rationing has been imposed. There is no immediate prospect of improvement in this situation, and it is quite certain that the 1940 records, when released, will show a sharply decreased output of tobacco products even as compared with war years.

With the cessation of hostilities (in progress from July 1936 until March 1939) steps were taken to return the industry to normal conditions. The Monopoly immediately began to repair damaged properties and to renew its business activities. While much was accomplished in a short time, it was almost impossible to obtain funds with which to buy replacement machinery, obtainable only from overseas.

Some of the difficulties that prevailed during the war years were still present throughout the year 1939. Outstanding among drawbacks was the inability to secure exchange for the importation of leaf tobacco. A partial shortage of paper and cardboard continued, and further effects of the war were in evidence in administration, distribution, and disorganization caused from the loss of trained personnel. Despite these adversities, Monopoly officials state that tobacco consumption reached a high level. Consumption of leaf in the manufacture of tobacco products in 1939 is estimated to have been about 54.7 million pounds, 37.7 million of which were imported, and the remaining 17 million grown within the country. The greater part of these leaf imports was paid for through the exchange of Spanish goods, as pesetas were not available to buy foreign moneys.

In view of the exchange difficulties in 1939, it was decided that the Monopoly should suspend for the time being the importation of foreign cigarettes, which had been previously brought in by the Monopoly and sold throughout Spain on a commission basis. It is anticipated that when normal conditions have returned these commission sales will be resumed.

A complete record of the Monopoly's activities during the war years will probably never be known. At the outbreak of hostilities in July 1936, only 4 of the 12 factories owned by the Monopoly were in the Nationalist or Franco territory. Four more were added as the war progressed. Some statistics were kept by officials in the Nationalist area, but at best they are said to be largely estimates. In the Loyalist area, apparently no records were kept regarding the tobacco trade or manufacturing activities, but the administrative records of the Monopoly Company were in Madrid, which remained in the hands of Loyalist forces until the end of the war.

Estimates from the Nationalist areas show that during 1937 tobacco production facilities were too limited to meet requirements, but the aggregate output of products in 1938 compared favorably with that of the whole country prior to the war. Approximately 13.7 million pounds of leaf were consumed in Nationalist factories in 1938, compared with a prewar consumption for all Spain of about 14.8 million pounds.

Among the problems that persisted during both 1937 and 1938 was the question of leaf supplies. Consequently, manufacturers began using Spanish-grown leaf whenever possible. Quality was a relatively minor consideration. During the years immediately preceding the war, consumption of Spanish-grown leaf by the Monopoly amounted to about 5.5 million pounds. In 1938 consumption of domestic leaf increased to 13.2 million pounds and was limited to that total only because additional stocks were not available. In recognition of this development and during the same year, the Government Central Commission for the Cultivation of Tobacco increased the tobacco area in Spain from 12,355 acres to 24,710 acres.

PRODUCTION OF TOBACCO IN GERMANY

The 1940 tobacco crop in Germany has been reported by the German press to have been approximately 96.2 million pounds, including the quantities produced in the West Prussian, Suwalki, and Alsacian districts. Production in 1939 (not including these districts) is reported by the same source at 78.8 million pounds.

Efforts are being made, according to the report, to grow flue-cured tobacco, and to start the seedlings under glass where the seasons do not permit normal sowings. German tobacco production covers approximately one-third of the domestic consumption exclusive of tobacco for cigarette production, which is practically all imported.

SHORTAGE OF TOBACCO SUPPLIES
CAUSES SHIFTS IN
SWEDISH CONSUMPTION . . .

Preliminary estimates of the Swedish Tobacco Monopoly place the Swedish tobacco crop of 1940 at about 992,000 pounds, compared with an average production of about 1,200,000 pounds, according to information received in the Office of Foreign Agricultural Relations. Although the quality of the 1940 crop is reported good, its harvest marks the third successive year that production has been below normal in quantity. The area planted in 1940 was 531 acres, the same as in 1939, but the number of growers declined to 1,219, compared with 1,282 in 1939. The average price paid by the Monopoly to tobacco growers in 1940 was 1.50 crowns per kilo (16.2 cents per pound), compared with 1.28 crowns (13.9 cents) in 1939.

SWEDEN: Growers, area, production, farm value, and price of tobacco, 1929-1940

Year of harvest	Growers	Area	Production	Farm value	Price per pound
	<u>Number</u>	<u>Acres</u>	<u>1,000 pounds</u>	<u>1,000 dollars</u>	<u>Cents</u>
1929	1,717	756	1,235	195	15.8
1930	1,700	724	1,345	185	13.8
1931	1,654	682	961	121	12.6
1932	1,604	650	1,327	120	9.0
1933	1,760	697	1,202	121	10.1
1934	1,858	662	1,093	133	12.1
1935	a/	665	1,237	141	11.0
1936	1,763	642	1,365	151	11.0
1937	1,686	623	1,001	134	13.4
1938	1,526	596	805	107	13.3
1939	1,282	531	847	118	13.9
1940	1,219	531	992	161	16.2

Aktiebolaget Svenska Tabaksmonopolets, Verksamhet Statistik Arsbok for Sverige.

a/ Not available.

The domestic crop, however, represents only about 5 percent of the total tobacco consumption in Sweden. The industry imports in normal times from 10 to 15 million pounds of leaf tobacco annually, two-thirds to three-fourths of which is supplied by the United States. Leaf exports from the United States to Sweden amounted to approximately 10.5 million pounds in 1939, but owing to the North Sea blockade only about

2.5 million pounds went through in 1940. It is indicated by press reports that stocks of leaf on hand (all types) are sufficient for at least another year's consumption.

In general, it has been noted that increased prices resulting from several tax increases have caused a decline in the Swedish demand for cigarettes and cigars. Pipe tobacco, on the other hand, has become more popular because its use is more economical. The decline in the consumption of tobacco products, especially cigars, has forced the Monopoly to reduce its personnel by 210 persons from the beginning of 1941.

Local importers state that imports of manufactured tobacco products into Sweden have practically ceased. None have come in from the United States since the beginning of the North Sea blockade in April 1940, and attempts by importers to have cigarettes shipped from the United States to Sweden via Petsamo have been nullified by the Swedish authorities. Importers of tobacco products have lately started a voluntary rationing of their limited supply of American cigarettes, stocks of which will be exhausted within the next few months. There is reason to believe, however, that cargo space will be made available for the import of small quantities of American cigarettes in the near future.

The scarcity of imported tobacco products and near-prohibitive prices arising from the imposition of new taxes have enhanced the demand for domestic products. Local importers claim that, despite a considerable decline in the sales of imported tobacco products, the total quantity sold in Sweden during the last quarter of 1940 has been maintained at approximately the same level as a year ago because of the increased consumption of domestic brands. The most popular cigarette in Sweden is a domestic brand made principally of American flue-cured tobacco and retailing at 1.30 crowns (30.9 cents) per package of 20. This price compares with 3.25 crowns (77.4 cents) per package for well-known American brands that are imported.

A committee appointed to investigate the Swedish tobacco trade has recommended that the import trade in manufactured tobacco products (heretofore licensed) should be placed exclusively under the Monopoly. According to the committee, licensed importers have had considerable inconvenience owing to the increased taxes levied on their importations. After the establishment of the proposed import monopoly, taxes on imported and domestic tobacco products will be imposed on the same basis. In order to provide for a sufficient supply of imported tobacco products, it has been suggested that their prices be regulated so that the value of their annual consumption will amount to not less than 10 nor more than 15 percent of the total consumption of tobacco products in Sweden. This is about the proportion that prevails at present.

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F R U I T S, V E G E T A B L E S, A N D N U T S

UNITED STATES BANANA IMPORTS
CONTINUE TO DECLINE . . .

Imports of bananas into the United States amounted to 52,336,000 bunches during the calendar year 1940 or about 5 million bunches below imports in the previous year, and 14 million bunches below the high level of 1937. Honduras was the principal source of supply, accounting for 28 percent of the total, followed by Guatemala with 16 percent. Shipments from Mexico, which has been the leading supplier, dropped over 50 percent, due partially to disease infestation which has substantially damaged the Mexican crop.

BANANAS: Imports into the United States by principal
countries of origin, averages 1921-1925, 1926-1930,
and 1931-1935, and annual 1936-1939

Country of origin	Average			Annual			
	1921- 1925	1926- 1930	1931- 1935	1937	1938	1939	1940
	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches	1,000 bunches
British Honduras	640	457	245	839	628	533	608
Costa Rica.....	3,513	4,527	3,289	4,948	4,074	2,901	3,334
Guatemala.....	4,923	6,242	3,916	8,874	9,175	9,588	8,227
Honduras.....	13,482	19,301	15,646	9,582	9,889	11,820	14,619
Nicaragua.....	2,740	3,178	2,955	2,501	2,082	1,731	1,162
Panama.....	4,599	4,727	5,391	7,224	6,353	5,696	5,908
Mexico.....	2,111	5,609	7,447	16,765	15,497	13,913	6,614
Jamaica.....	10,229	12,750	3,476	85	10	1	169
Other British							
West Indies...	47	30	23	38	4	12	9
Cuba.....	2,053	3,330	4,020	8,534	4,227	4,790	4,375
Dominican							
Republic.....	44	10	4	124	420	826	552
Haiti.....	a/	a/	182	1,379	1,443	2,030	3,106
Colombia.....	2,577	1,676	2,448	4,612	3,751	2,078	2,274
Ecuador.....	14	0	464	1,079	1,160	999	878
Venezuela.....	28	0	0	3	0	85	27
Canada.....	5	18	17	a/	0	0	0
Brazil.....	a/	a/	2	0	0	2	0
Others.....	52	32	a/	0	530	123	374
Total.....	47,057	61,887	49,525	58,302	66,587	59,243	57,128

Compiled from official records, Bureau of Foreign and Domestic Commerce.
a/ Less than 500 bunches.

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MEXICAN VEGETABLE SHIPMENTS
CONTINUE AT HIGH LEVEL . . .

Exports of Mexican winter vegetables to the United States continued at a high level during the first half of February, according to a report from American Vice Consul Thomas M. Powell at Nogales. Shipments totaled 9,674,000 pounds compared with only 3,911,000 pounds for the same period in 1940. Exports for the entire season, November 23 to February 15, amounted to 27,441,000 pounds, or slightly more than double the volume moved in 1939-40. Damage due to unfavorable weather reduced the vegetable crops (especially tomatoes) in both Florida and Cuba this season, and reduced competition accounts in large measure for the heavy increase in Mexican exports.

MEXICO: Vegetable shipments to the United States February 1-15, 1939-1941, and November 23 to February 15, 1938-39 to 1940-41

Vegetable	February 1 to 15		
	1939 <u>1,000 pounds</u>	1940 <u>1,000 pounds</u>	1941 <u>1,000 pounds</u>
Tomatoes	881	2,535	6,648
Green peas	490	1,003	1,169
Green peppers	237	327	1,787
Eggplant	46	46	70
Cucumbers	3	0	0
Total	1,657	3,911	9,674
	November 23 to February 15		
	1938-39	1939-40	1940-41
Tomatoes	7,348	10,294	21,647
Green peas	1,328	1,639	2,744
Green peppers	1,144	1,135	2,919
Green beans	5	0	0
Eggplant	137	47	131
Cucumbers	5	0	0
	9,967	13,115	27,441

American Consulate, Nogales.

Practically the entire increase has been due to heavier shipments of tomatoes, which have accounted for nearly four-fifths of the total movement this season. In the first half of February, tomato shipments increased more than two and a half times, while the total for the season has risen slightly more than two-fold. A significant volume of small-sized stock has been shipped in bond through the United States for Canadian markets. Shipments of peppers have been maintained and, with continuing favorable demand conditions, peppers were expected to continue moving in volume, at least for another month. Exports of green peas were expected to decline abruptly because peas from the Imperial Valley of California began to move in volume in February.

TURKISH GOVERNMENT ALLOTS FUNDS
TO PURCHASE DRIED FRUIT
AND OLIVE OIL

The Turkish Ministry of Commerce has been granted 3 million Turkish pounds (\$2,250,000) to purchase various products under decrees approved by the Council of Ministers, according to reports received in the Office of Foreign Agricultural Relations. The objectives of these decrees are to regulate prices and to maintain control of stocks so as to protect both producers and consumers.

The first decree, dated November 4, 1940, allotted 2 million pounds (\$1,500,000) to buy raisins and figs directly from producers; while a decree of December 24 provided a credit of one million pounds (\$750,000) for the Agricultural Bank of the Turkish Republic to purchase olive oil for the account of the Commerce Ministry. These decrees were promulgated under the authority granted in the Law of National Defense, Number 3780, of January 24, 1940.

CANADIAN FRUIT AND VEGETABLE
DUTY VALUATION

CANADA: Record of seasonal advanced valuation for calculating duty on imports of fruits and vegetables, 1940-41 a/

Commodity	Advanced valuation Cents per pound	Date established	Date cancelled	Region affected
Beets b/	1.0	Oct. 16 Nov. 8		Ontario-Quebec Western Canada
Carrots b/	0.8	Oct. 16 Nov. 8	Mar. 5	Ontario-Quebec Western Canada
Cabbage b/	0.8	Oct. 16 Nov. 8	Mar. 1	Ontario-Quebec Western Canada
Celery	0.8	July 28 Aug. 1		Maritime Provinces Ontario-Quebec

Compiled from reports of the Department of National Revenue, Canada. Western Canada includes the Provinces of British Columbia, Alberta, Saskatchewan, and Manitoba. The Maritime Provinces include Nova Scotia, New Brunswick, and Prince Edward Island.

a/ For previous report, see issue of December 16, 1940, page 914.

b/ Second period.

L I V E S T O C K A N D A N I M A L P R O D U C T S

ARGENTINE CHEESE REPLACING ITALIAN IN UNITED STATES IMPORTS

Argentina is taking advantage of the opportunity provided by the war of becoming firmly established as an important source of United States cheese imports, according to information received in the Office of Foreign Agricultural Relations. Italy's entrance into the war has caused imports of cheese from that source to taper off since the summer of 1940, and it is stated that Argentina is in a position to export the Italian types to the American market in large quantities. In 1938, Italy supplied 46 percent of all United States cheese imports, or about 25 million pounds.

Statistics for the past 5 years show that the United States has been the most important market for Argentine cheese, but in 1940 exports to this country rose to 10,000,000 pounds, an increase of over 200 percent compared with 1939. Total exports of cheese from Argentina in 1940 were more than double those of 1939, amount to 12,500,000 pounds. In 1940 Argentine cheese represented 22 percent of total cheese imports into the United States.

Cheese production in Argentina has made rapid progress in the past 20 years, especially in the hard Italian types. In 1930, cheese production totaled only 34 million pounds and by 1939 it had increased to 113 million pounds. Statistics showing production by types in 1938 reveal that 54,460,000 pounds or 50 percent of the total consisted of hard cheese, and 36,418,000 pounds or 34 percent of semihard.

ARGENTINA: Production of cheese by types in 1938

Type	Quantity	Type	Quantity
	1,000 pounds		1,000 pounds
<u>Semihard</u>		Strictly cream cheese	18,644
Gruyere.....	3,569	Other types.....	152
Pategras.....	10,902	<u>Hard</u>	
Dutch type.....	1,892	Reggiano.....	3,463
Canadian Cheddar.....	454	Reggianito.....	2,515
Mar del Plata.....	2,200	Sbrinz.....	42,674
Gruyere Cream.....	2,315	Goya.....	1,235
Chubut and Tandil.....	9,403	Others.....	3,691
Others.....	5,683	Total.....	108,793

American consulate general, Buenos Aires.

The production of hard-type cheese in Argentina was the result of the disorganization of the Italian industry during the war of 1914-1918. In the 7 years, 1917 to 1923, exports of cheese to the United States from

Argentina averaged 7,000,000 pounds and those to Italy 4,000,000 pounds. Emphasis appears to have been on quantity rather than quality, and after 1923 shipments dropped to unimportant amounts. It seems probable that Italy imported Argentine cheese for domestic consumption and exported Italian cheese in order to hold important markets.

ARGENTINA: Exports of cheese by principal countries,
1938-1940

Country of destination	1938	1939	1940
	1,000 pounds	1,000 pounds	1,000 pounds
United States	1,407	3,221	10,406
Venezuela	282	401	401
Peru	311	485	251
Chile	55	60	148
Netherlands Guiana	-	-	53
Other Netherlands possessions ...	-	-	33
Panama	7	13	33
Canada	11	-	33
United Kingdom	289	249	622
Malta	-	-	33
Belgium	146	82	15
Italy	631	22	-
Others	1,224	845	468
Total	4,363	5,384	12,496

American consulate general, Buenos Aires.

The number of milk cows in Argentina was estimated at 2,847,000, according to the National Livestock Census of June 30, 1937, compared with 3,738,000 enumerated at the census of 1930, and 2,246,000 in June 1914. In a study made by the Argentine Rural Society in 1939 the number of dairy farms in Argentina was reported at 12,177, with the greatest number, or 7,345, located in the Province of Buenos Aires, where dairying represents 6.7 percent of the agricultural industry of the Province. In Argentina as a whole there is one dairy farm to every 1,078 persons and in Buenos Aires one to every 463 inhabitants. In relation to area, there is one dairy farm to every 62,000 acres in Argentina, and in Buenos Aires Province one to every 10,000 acres.

Climate and soil in much of Argentina's territory is especially adapted for dairy farming, from the great alfalfa regions of the central zones to the hills of Azul, Tandil, and Olavarria, and the mountain regions in the south, where exist dairying conditions similar to those found in Switzerland. Open pasturage is available the year around, and every type of ingredient for the production of scientific dry feeds is available within the country.

The fact that large areas of land have been held by a relatively few owners who have preferred to raise grains or beef cattle on a large

scale rather than practice diversified farming is the principal reason why the dairy industry in Argentina has not made greater progress. A slow, but gradual, trend toward increased small individual ownership of land and greater diversification has been noticed by the Argentine Ministry of Agriculture, especially in the Province of Santa Fé. A recently approved land colonization law in this Province aids the acquisition of small farms by individual farmers, and it is believed that this will tend to stimulate dairy farming. The number of commercial dairies in Argentina in 1938 was 1,265, of which 511 were classified as entirely given over to the making of cheese, 34 were classified as butter and cheese factories combined, 13 as butter cheese, and casein factories, and 55 as cheese and casein factories.

UNITED STATES: Imports of cheese by types and countries
of origin, 1938-1940

Type and country of origin	1938	1939	1940
<u>SWISS</u>	1,000 pounds	1,000 pounds	1,000 pounds
<u>Emmenthaler with eye formation -</u>			
Switzerland	6,924	8,925	4,081
Denmark	1,779	1,250	79
Finland	766	354	35
Other countries	435	30	0
Total	9,904	10,559	4,195
<u>Gruyere or processed a/ -</u>			
Switzerland	2,012	2,693	1,003
Denmark	38	8	10
Finland	1,113	734	131
Argentina	1	29	438
Other countries	250	119	18
Total	3,414	3,583	1,600
Total Swiss	13,318	14,142	5,795
<u>OTHER THAN SWISS</u>			
<u>Blue-mold in original loaves b/-</u>			
Denmark	2,306	2,358	525
France	263	229	24
Italy	663	581	305
Other Europe	140	97	35
Argentina	0	c/	757
Other countries	5	0	4
Total	3,377	3,265	1,650
<u>Cheddar -</u>			
Canada	1,800	6,330	623
United Kingdom	17	18	12
Other countries	1	4	0
Total	1,818	6,352	635

Continued -

UNITED STATES: Imports of cheese by types and countries
of origin, 1938-1940 - Continued

Type and country of origin	1938	1939	1940
<u>OTHER THAN SWISS - Continued</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>	<u>1,000 pounds</u>
<u>Edam and Gouda d/ -</u>			
Netherlands.....	4,411	2,790	851
Denmark.....	23	14	3
Norway.....	13	9	3
Argentina.....	0	0	190
Cuba.....	c/	2	30
Dominican Republic.....	c/	0	26
Uruguay.....	0	0	15
Other countries.....	15	c/	c/
Total.....	4,162	2,815	1,118
<u>Provoloni and Provolette -</u>			
Italy.....	5,107	3,266	1,145
Argentina.....	3	26	165
Total.....	5,110	3,292	1,310
<u>Reggiano or Parmesan -</u>			
Italy.....	1,400	2,059	822
Argentina.....	167	375	799
Uruguay.....	0	0	95
Other countries.....	0	2	0
Total.....	1,567	2,436	1,716
<u>Ramano or Pecorina -</u>			
Italy.....	15,227	15,500	9,644
Other Europe.....	198	257	200
Argentina.....	92	299	1,864
Total.....	15,517	16,056	11,708
<u>Roquefort -</u>			
France.....	2,392	2,974	1,584
Other countries.....	2	0	0
Total.....	2,394	2,974	1,584
<u>Other Cheese -</u>			
Italy.....	2,394	2,420	1,919
Albania.....	498	590	598
Yugoslavia.....	297	515	546
Greece.....	973	565	388
Norway.....	566	735	214
France.....	221	185	44
Denmark.....	199	268	37
Other Europe.....	672	716	320

Continued -

UNITED STATES: Imports of cheese by types and countries
of origin, 1938-1940 - Continued

Type and country of origin	1938	1939	1940
<u>OTHER THAN SWISS - Continued</u>	1,000 pounds	1,000 pounds	1,000 pounds
<u>Other Cheese - Continued -</u>			
Canada	119	94	111
Argentina	1,200	1,628	2,901
Cuba	10	9	11
Uruguay	0	0	2
Dominican Republic	14	0	1
Other countries	7	15	e/ 10
Total	7,170	7,740	7,108
Total Other than Swiss	41,115	44,930	26,829
Total all types	54,433	59,072	32,624

Compiled from official records, Bureau of Foreign and Domestic Commerce.
a/ Classification established February 15, 1936. b/ Classification established June 15, 1936. c/ Less than 500 pounds. d/ Classification established February 1, 1936. e/ Other Latin American Republics.

AUSTRALIA FACES

MEAT SURPLUS . . .

Australasia is faced with the problem of a considerable meat surplus since the reported heavy curtailment of the United Kingdom's normal purchases in 1941 as a result of restricted shipping space. Certain classes of meat, mainly inferior cuts, have been omitted from the new British schedule of purchases for the period October 1, 1940, to September 30, 1941.

Representatives of the Australian and New Zealand Governments have had consultations with the view of adopting common measures to meet this problem, which affects both countries. Methods already taken, or under consideration by local marketing authorities, include increase of storage facilities, economizing of shipping space by new cutting and packing methods, shipments to new export markets, especially in the Far East, and expansion of the domestic meat-canning industry.

In New Zealand the Government has agreed to purchase all of the exportable meat surplus of the 1940-41 season. Killings for export since the commencement of the current season (October 1, 1940, to February 15, 1941) totaled 5,546,000 freight carcasses, an increase of 17.1 percent over the corresponding period of 1939-40. Lamb killing increased by 17.2 percent, beef by 14.6 percent, and pork by 25.6 percent. Mutton slaughtering decreased by 17.1 percent.

Livestock numbers in both Australia and New Zealand are materially larger than at the beginning of the war of 1914-1918. In 1940, livestock numbers in Australia were as follows, according to preliminary estimates based on incomplete returns, with percentage increase above 1914 given in parentheses: Cattle 13,100,000 (14 percent); sheep 116,500,000 (31 percent); hogs 1,364,000 (70 percent). The number of cattle in Queensland is reported to be larger than in the past 15 years, although there was no estimate made as of January 1, 1941. On January 1, 1940, cattle numbered 6,199,000 head compared with 6,097,000 in 1939. Queensland carries 47 percent of the total number in Australia and is the principal beef-exporting State.

In New Zealand, livestock numbers and percentage increases as compared with 1914 were as follows: Cattle 4,533,000 (88 percent); sheep 31,063,000 (25 percent); hogs 714,000 (140 percent). The greatest percentage increase in both of these countries was in hogs and the greatest numerical increase in sheep.

AUSTRALIA AND NEW ZEALAND: Number of cattle, sheep, and hogs,
at beginning of specified years

Year	Australia (January 1 a/)			New Zealand (January 31)		
	Cattle	Sheep	Hogs	Cattle	Sheep b/	Hogs
	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
1914	11,484	88,947	801	c/ 2,417	24,788	298
1918	11,829	88,864	1,169	2,869	26,538	259
1921	13,500	81,796	764	3,139	23,285	350
1925	13,309	93,155	980	3,504	24,548	440
1930	11,202	104,558	1,018	3,770	30,841	488
1935	14,049	113,048	1,158	4,293	29,077	763
1936	13,912	108,876	1,294	4,254	30,114	808
1937	13,492	110,243	1,203	4,389	31,306	802
1938	13,078	113,373	1,100	4,506	32,379	756
1939	12,862	111,058	1,154	4,565	31,897	683
1940	d/ 13,100	d/ 116,600	d/ 1,400	4,533	31,063	714

Compiled from official sources.

a/ Estimate of December 31, preceding year. b/ Estimate of April 30.
c/ Year 1916; no estimate available for 1914. d/ Preliminary estimate based on the following: Cattle, estimates for four States carrying 69 percent of total in Australia; sheep, estimates for four States carrying 92 percent of total; hogs, estimate for four States carrying 63 percent of total.

Australia normally exports around 20 percent of the beef produced and between 25 and 30 percent of the mutton and lamb produced, principally to the United Kingdom. New Zealand exports about 25 percent of the beef produced, but around 75 percent of the lamb and mutton.

DENMARK PRODUCES MORE MEAT; LESS MILK, BUTTER, AND EGGS . . .

Denmark's production of meat in 1940 increased as a result of heavy liquidation of livestock due to scarcity of feedstuffs, according to information available in the Office of Foreign Agricultural Relations. Beef and veal production totaled 452 million pounds and was 34 percent larger than in 1939 and larger than for any year in the past decade. Pork production was estimated at 694 million pounds, which was an increase of only 2 percent above 1939. Hog numbers were on the increase when the war started and only began to show a decrease in the fall of 1940. Pork production was considerably larger, however, than in the years 1935 to 1939.

DENMARK: Production of meat, dairy products, and eggs, 1930-1940

Year	Beef and veal	Pork	Milk a/	Butter	Eggs
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
1930.....	320	931	1,380	419	164
1931.....	321	1,127	1,427	430	181
1932.....	322	1,200	1,406	414	200
1933.....	278	987	1,382	408	204
1934.....	291	753	1,364	403	211
1935.....	281	667	1,313	381	223
1936.....	324	626	1,352	397	254
1937.....	363	711	1,359	404	276
1938.....	322	649	1,397	418	274
1939.....	337	682	1,352	403	296
1940.....	452	694	1,236	366	254

Statistiske Efterretninger, January 9, 1941. a/ Year beginning October 1.

Livestock numbers remained practically normal through June 1940, but declined thereafter (see Foreign Crops and Markets, February 17, 1941). The number of cattle reported as of November 2, 1940, was 2,976,000 against 3,186,000 in December 1939. Milk cows were reduced 2 percent to 1,511,000. By December 1940, the number of hogs had fallen to 2,189,000, or 30 percent below December 1939. A still further reduction occurred in the first few months of 1941. The number of bred sows in December 1940 was only 128,000 compared with 242,000 in December 1939.

Milk production in 1940 amounted to 1,236 million gallons, a reduction of 9 percent compared with 1939 and the smallest production in the past 10 years. Butter production also decreased materially to 366 million pounds compared with 403 million in 1939. Egg production in 1940 amounted to 254 million pounds, a 14-percent decrease compared with 1939. In July 1940 chickens (cocks, hens, and chickens) numbered 24,551,000 compared with 32,398,000 on the same date of 1939.

Monthly exports of bacon declined materially in 1940 as compared with 1939, but exports of live hogs increased. Both pork and live hogs now go to Germany instead of to Great Britain. Slaughter of hogs in export slaughter houses in 1940 totaled 3,353,000 head, a reduction of 18 percent compared with the same months of 1939.

DENMARK: Exports of specified livestock products,
1939 and 1940

Month	Bacon		Live hogs		Butter		Eggs	
	1939	1940	1939	1940	1939	1940	1939	1940
	Million pounds	Million pounds	1,000 head	1,000 head	Million pounds	Million pounds	Million score	Million score
January...	30.0	34.0	2.3	10.5	22.0	24.0	6.9	7.8
February...	28.9	13.9	12.1	12.1	22.0	19.8	6.9	5.3
March.....	32.2	46.3	15.0	12.8	26.2	26.9	7.5	6.8
April.....	35.9	26.2	14.2	24.9	28.4	26.9	7.3	6.6
May.....	30.6	20.1	13.0	53.4	29.3	34.8	7.3	6.7
June.....	30.9	27.3	14.9	38.4	32.8	27.3	8.1	6.8
July.....	36.6	35.5	8.8	93.3	32.6	17.9	8.2	7.7
August....	35.1	36.6	10.6	144.4	30.0	12.6	6.5	4.3
September..	41.2	15.4	6.7	154.7	34.4	12.1	7.8	3.5
October...	28.4	15.0	13.3	124.6	23.1	9.7	5.1	3.9
November...	38.4	19.0	13.7	56.3	24.9	11.5	6.0	3.4
December...	37.3	26.2	13.0	28.6	24.7	14.3	8.0	4.4
Total...	405.5	295.5	137.6	754.0	330.4	237.8	85.6	67.2

Compiled from Statistiske Efterretninger.

DENMARK: Monthly hog slaughter in export houses,
1936-1940

Month	1936	1937	1938	1939	1940
	Thousands	Thousands	Thousands	Thousands	Thousands
January.....	338	421	317	356	330
February.....	287	296	321	304	255
March.....	412	439	340	361	405
April.....	352	329	355	302	250
May.....	357	361	317	321	329
June.....	340	343	353	362	224
July.....	284	349	268	301	370
August.....	348	360	370	402	192
September.....	474	445	353	294	242
October.....	305	242	304	334	252
November.....	392	369	313	377	257
December.....	419	368	296	358	a/ 247
Total.....	4,308	3,422	3,914	4,072	3,353

Compiled from Statistiske Efterretninger. a/ Preliminary.

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G E N E R A L A N D M I S C E L L A N E O U S

FOREIGN EXCHANGE . . .

EXCHANGE RATES: Average value in New York of specified currencies,
March 22, 1941, with comparisons a/

Country	Monetary unit	Year 1940	Month					Week ended		
			1939	1940	1941			1941		
			Feb.	Feb.	Jan.	Feb.	Mar. 8	Mar. 15	Mar. 22	
			Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Argentina ..	Paper peso	29.77	31.24	29.77	29.77	29.77	29.77	29.77	29.77	29.77
Australia <u>b/</u>	Pound	305.16	373.33	315.79	321.50	321.11	321.34	321.25	321.31	
Canada <u>b/</u> ...	Dollar	85.14	99.50	86.65	84.80	83.69	85.17	84.86	84.90	
China	Shang.yuan	6.00	15.89	7.01	5.39	5.42	5.43	5.41	5.34	
England <u>b/</u> ..	Pound	383.00	468.57	396.34	403.42	402.97	403.24	403.16	403.20	
Germany	Reichsmark	40.02	40.12	40.12	39.98	39.97	39.96	39.97	39.96	
Italy	Lira	5.04	5.26	5.05	5.04	5.04	5.04	5.04	5.05	
Japan	Yen	23.44	27.30	23.44	23.44	23.44	23.44	23.44	23.44	
Mexico	Peso	18.55	19.97	16.65	20.50	20.52	20.52	20.52	21.04	
Sweden	Krona	23.80	24.13	23.81	23.83	23.83	23.82	23.82	23.82	
Switzerland..	Franc	22.68	22.67	22.42	23.22	23.22	23.21	23.21	23.21	

Federal Reserve Board.

a/ Noon buying rates for cable transfers. Denmark, France, the Netherlands, and Norway have been omitted, as rates are not at present available. The last average monthly quotations in 1940 were as follows: Denmark, March, 19.31 cents; France, June, 2.01 cents; the Netherlands, April, 53.08 cents; and Norway, April, 22.71 cents.

b/ In addition to the free rate there is also a fixed official buying rate; Australia, 322.80; Canada, 90.91; and England, 403.50 cents.

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